

Looking for a Successor

Demand for our services has increased radically and we need a team member to be totally responsible for the financial planning process and part of the team for ongoing client service.

I'm not retiring for many years (47 now) but at some point someone (likely more than one) will need to run the show and it could be you. This is a career opportunity.

You will keep 100% of all planning fees coming into the firm and if it works out between us you will get a share of money management revenues.

If it works out for the long term you will either run the firm or run it with a team and I will likely be very lightly attached.

I've been at this since 2001 and know what clients want. Word of what we do, how and why, is starting to spread like wildfire. There's a chance we will try to grow the firm much larger, TBD, but we need a planner now to meet current demand.

The ideal candidate will be either be a CFP, have passed the exam, or be in process but absolutely committed to confidentiality and the fiduciary standard at the deepest level. We use eMoney, the learning resources and support are excellent if you don't know the product but you will be expected to figure out how to be an expert.

We need you to understand and work by old-school service values.

We are in Piedmont/Oakland so the ideal situation is for you to be close enough to make it to initial client meetings, and final plan presentations, so no time is lost in starting the planning process. We meet with clients at their convenience so your schedule needs to be flexible but the planning work can be done whenever you want.

It would be ideal for you to come to the office regularly, even daily, because then we can function better as team but this is not required.

You need to be completely responsive (hours, or less, but not days) both as a team member and to clients.

My practice is not for sale to other firms trying to grow through acquisition but I would consider buying another practice from someone needing to move on and who shares the same values.

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